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ABSTRACT

Educational personnel having major responsibilities for research and development were invited to attend three one-week institutes to receive training in the use of selected management tools. instructional topics such as systems and management analysis, and definitive studies of management information systems (MIS), program planning budgetary systems (PPBS), and program evaluation review techniques (PEPT) were selected as useful to administrative personnel in planning, decision making, and evaluation. The major objective of the training program was to instill in the attendants knowledge and skills necessary for the application of these tools in the daily operation of project and school system management. Most participants rated the program as good or excellent in overall effectiveness. A followup survey of selected participants indicated that knowledge and skills acquired in the institutes were being used in the home organizations. (Author/RA)

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FINAL REPORT

Project No. 9-0369

Grant No. OEG-0-9-230369-4597(010)

**A TRAINING PROGRAM FOR EDUCATIONAL
MANAGEMENT TOOLS**

Sam W. Bliss

Southern Illinois University

Carbondale, Illinois 62901

June 30, 1970

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Southern Illinois University**

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**Sam W. Bliss
Director**

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CHAPTER I

INTRODUCTION

Many changes, two decades or less in the making, have combined to produce a new and much different world, a more dynamic technology, and a revolutionary social order. Educational implications now and in the years ahead are equally challenging and clearly require vigorous educational leadership. The decade of the fifties marked the beginning of an effort to improve the professionalization of educational administration under the leadership of the Cooperative Program in Educational Administration. Other research efforts by universities, educational agencies and special projects have developed techniques for managing school systems which must be made available to practicing administrators.

The gap between the promise of education and its attainment continues to increase and is of grave concern among professional educators and enlightened citizenry. Secretary Gardner issued a challenge to educators when he stated:

. . . educators . . . become not only teachers of their students but teachers of the nation in the new philosophy of learning and living in an ever changing world (and) . . . that they . . . convince the American people, once and for all, of the truth of Toynbee's (statement) that "civilization is a movement and not a condition, a voyage and not a harbor."¹

The causes are not new but the implications for rapid change in school management procedures should not be ignored. Practicing school administrators need to be trained in the procedure of how to apply the methodologies recently developed by modern technology, i.e., systems analysis, management information systems, planning programming budgetary systems, and program evaluation review technique.

The term "educational planning" is being used increasingly at various levels of education in local school districts, state educational agencies, and other educational agencies throughout the nation. Edgar L. Morphet has written that:

¹Gardner, John W., "Impact of Change on Education," NEA Journal, November, 1959, p. 51.

Planning is not a process of speculating on probable developments and preparing a theoretical blueprint for meeting needs. Rather it is a process of attempting to determine appropriate goals and objectives, obtaining and analyzing pertinent information that will bring into focus present and emerging problems and needs, and obtaining agreement on steps and procedures that are designed to meet those needs so objectives can be attained.²

Educational research and planning is being viewed as an important means for achieving the short and long-range objectives of the institution. Several factors have complicated the effectiveness of educational planning since the end of World War II. They are:

1. A rapid growth in the school age population.
2. Recognition that education is an important instrument for attaining national, regional, state and local objectives.
3. The increasing size and complexity of the educational organizations.
4. The expanding need for adoption of new innovations in educational institutions.
5. The increased costs and need for greater financial support to improve and expand educational programs.

To aid in the solving of the problems presented by increased size, complex operations, and limited resources, educators need to adopt new and modern methods for effective planning. These new methods should be brought to the attention of educational leaders in order that he will have available: (1) the tools that can provide a quick assessment of alternative courses of action, (2) the procedures to measure progress toward the achievement of objectives, and (3) the methodology through which growth and change can be directed and controlled.

Much work has been done to analyze specific aspects of educational activities and individual resources, however, very little concerted effort has been made to deal with problems within the context of a complete system. Systems theory approaches the problem from a universal or global approach and thus seeks to conceive problems in their full complexity. Systems theory is an

²Morphet, Edgar L., "Planning and Effecting Needed Changes in Education," Reports Prepared for the Third Area Conference, Designing Education for the Future: An Eight-State Project, Denver, Colorado, June 1967, p. vii.

approach which offers a technology for problem solving and decision making. John Pfeiffer wrote that:

The system approach can be regarded as a disciplined way of using specialists in a variety of fields to analyze as precisely as possible sets of activities whose interrelationships are very complicated, and of formulating comprehensive and flexible plans on the basis of the analysis.³

In the past, planners have been frustrated in their efforts because of the great number of possible alternatives, the complexity of the inter-relationships among programs, and the uncertainties of the probable overtones that exist in the various combinations of the program elements. Educational institutions have not had the availability of trained personnel to comprehensively analyze the effect of alternative policy decisions. Effective planning is not possible without a technology that can relate simultaneously all aspects of educational institution operation and feasible alternative courses of actions.

Problem Statement

School research personnel and administrators are faced with performance in four critical take areas: (1) providing for the substantive areas of school administration, (2) providing for a continuous effort directed toward modifying and refining the instructional program, (3) providing for the organization and administration of school personnel, and (4) providing communication with the lay public and the profession in obtaining greater support for education. Institutions of higher education training school administrators offer little, if any, opportunities in their regular program for acquiring practical knowledge and skill in the use of the newer management tools. Practicing school research officials and administrators need the management tools today---not sometime in the future---if they are to meet the challenges facing education. Donald Rappaport, C.P.A. for Price, Waterhouse, and Company believes there are three promising approaches to the management of public education: (1) planning-program budgeting, (2) decentralized decision centers, and (3) an educational information center.⁴ The problem is that there is

³Pfeiffer, John, New Look at Education: Systems Analysis in our Schools and Colleges. Odyssey Press, Poughkeepsie, New York, 1968, p. 2.

⁴Rappaport, Donald, New Approaches in Public Education. American Institute of Certified Public Accountants, New York, New York, 1968.

a lack of knowledge and the necessary skill required in the application of these basic management tools to the daily operation of school systems and project management.

Objectives

Through an understanding of system theory concepts, educational research leaders can obtain direct assistance in dealing with many of the complex problems impacting upon their areas of responsibility. System theory concepts present an approach to problem solving and innovation which is in step with the present and future needs of practicing educators.

The major objective of the training program was to develop within the research and educational leader the practical working skill needed for application of system theory and management techniques to their operational responsibilities. Subordinate learning objectives are:

1. Define what is meant by system analysis and list the basic steps related to system analysis procedures.
2. Define the meaning of the Management Information System (MIS), list the major component parts of an educational management information system and list the basic steps in implementing an MIS in practice.
3. Define Program Planning Budgetary System (PPBS) and list the component parts of PPBS and describe various implementation considerations.
4. Define Program Evaluation Review Techniques (PERT) and list the basic elements of PERT and prepare a PERT network from a simulated problem situation.

Procedures

Three intensive training institutes were conducted for the purpose of imparting knowledge and information concerning general system theory concepts to persons in educational research leadership roles. Specific emphasis was to be placed upon the process of translating theory into techniques, products and organizational patterns that can be of immediate use to the educational research leader. Concentrated efforts were made to join theory with fact as well as to reinforce the relationship between the ideal and real situations. A more detail discussion of the specific procedures follows in Chapter II.

CHAPTER II

METHODOLOGY

Announcement

As stated in the general procedures of the contract grant:

Participants will be recruited from throughout the nation and the basic criterion for admittance will be the person's present or anticipated leadership position for research and development activities within their organization (p. 4).

To achieve this goal an announcement letter and application brochure was prepared (Appendix A) and distributed through professional associations, regional laboratories, and research and development centers. In addition the announcement-application was sent in quantity to (1) each chief state school officer, (2) each major state university's College of Education, (3) each Director of Research listed by the state educational agencies, (4) a random selection (one of every ten) of the membership of the American Educational Research Association.

A total of 1200 pieces were mailed to organizations, agencies and individuals announcing the programs including provisions for application. Further announcement was made through the professional publications of AASA, ASBO, AERA, AACTE, UCEA, CCSO and COMPACT.

Selection of Participants

In addition to the biographical data requested on the application form each applicant was requested to submit a separate statement covering three additional areas of information. They were asked to:

1. Briefly describe present or anticipated responsibility for research and development programs.
2. Briefly describe background in educational training and experience in the field.
3. Briefly specify any previous or current training and/or experience in the specific management tools area to be covered.

With this information as the primary basis for selection, the program was designed to reach two primary groups:

- a. Practicing school research personnel and administrators in city systems, directors of federally supported research and development programs in education, and coordinators of research and planning operations in local, state and national educational agencies.
- b. Deans, department heads, and professors of educational research and administration in universities and colleges.

In the selection process a subjective judgment was made offering the participation opportunity to those who could profit most from the program. No more than two participants were selected from the same agency or institution, and a broad geographic mix was sought in addition to the professional mix to which prior reference was made.

Instructional Procedures:

The faculty consisted of both visiting lecturers and professional staff from Southern Illinois University (Appendix B). All were specialists in their area of presentation. Each faculty member was invited to submit resource material which was either purchased or reproduced for the use of the participants. Overhead and slide projection was arranged through the Learning Resource Center of the University.

The lecture-discussion mode of teaching was supplemented with case studies, visual aids and with question-answer periods built into the daily training schedule. The weekly instructional schedules are provided in (Appendix C).

On the basis of weekly evaluations the faculty was asked to modify the content and mode of presentation to more adequately meet the felt needs of the participants and to improve future institutes.

Evaluation Procedures: Weekly Critique

A dual evaluation form was prepared allowing the participants an opportunity to evaluate each topic and each presentation within the topic both by numerical rating and by verbal comment. The form (Appendix D) was modified slightly for each week to reflect changes in design.

Following each program week, the content of the evaluation was summarized and sent to each member of the faculty. A meeting of local faculty was held following each week to discuss the

evaluations and seek ways of improvement. Course and procedural modifications resulted from these evaluation sessions which created a more effective learning environment but which did not significantly alter the general program design.

Evaluation Procedures: On-Site Visitations

In preparation for evaluative visitations an instrument was devised to assist the evaluator (Appendix E). It allowed for a combination of subjective and objective criteria.

Evaluators were members of the program faculty and staff who have a good grasp of the over-all program objectives and content. The four ment Dr. Robert Schellenberger, Dr. Sam Bliss, Dr. Dale Kaiser and Mr. B. D. Cross conducted 14 interviews at 11 universities and agencies.

The purpose of these evaluations was to determine the long-term effect and benefit of the training program on the individuals participants and the contribution made to their institution resulting from their participation.

Data Treatment

Two general types of data were collected in the evaluation procedures: (1) descriptive type data, and (2) numerical type data. The descriptive type data were analyzed to present a composite picture of the weekly institutes and on-site visitations. This data, in some instances, were quantified for explanatory purposes. The numerical data were handled by manual tabulation and were transferred to tabulation sheets according to appropriate classification and grouping. Distributions were created for certain data items and totals were presented. The data acquired in the evaluations are presented in table and narrative form in the following chapter.

CHAPTER III

EVALUATION

The findings presented in this chapter depict the responses of the participants relating to: (1) the program evaluation for each of the three one-week training institutes, and (2) the selected on-site evaluations. Implications and inferences of these two types of evaluation are stated in Chapter IV.

Weekly Training Institutes

Participants of each intensive training institute completed a program evaluation form (see Appendix D) on the final day of each weekly institute. The purpose of the program evaluation was two-fold: (1) to assess the effectiveness of the weekly training program, and (2) to provide information which would assist in the modification of the following weekly training institutes. The major overall objective was to provide an introductory perception of selected management tools: (1) systems analysis, (2) management information systems (MIS), (3) planning, programming, budgeting systems (PPBS), and (4) program evaluation and review techniques (PERT).

Table I shows the overall program effectiveness ratings as provided by the individual participants for each weekly institute and the total for the three institutes. There are fewer responses than the total number of participants since each participant had the option of answering or not answering each question on the evaluation form.

TABLE 1. PARTICIPANTS RESPONSES REGARDING THE
OVERALL EFFECTIVENESS OF THE TRAINING PROGRAM

Date of Institute	Excellent	Good	Fair	Poor
October 6-10, 1969	8	15	3	0
December 8-12, 1969	4	12	8	1
January 12-16, 1970	9	12	2	0
Totals	21	39	13	1

Each of the major topics offered in the institutes were rated by the participants in terms of content, materials, presentation and value to the participant. Table 2 portrays these responses for the October 6-10 Institute. After the October institute, the evaluative responses, obtained from the participants, were analyzed for purposes of improving the following institutes. The review lead to an expansion of management analysis system in terms of cost effectiveness. Additional time in the December 8-12 and January 12-16 weekly institutes was allocated for presenting and discussion this particular topic. Table 3 lists the responses of the December 8-12 institute. Table 4 displays the responses for the January 12-16 institute. Table 5 provides the summary of responses for all three institutes. Variations in participant ratings are observable between the weekly institutes. However, in all three weeks the excellent and good ratings are much higher than the fair or poor groupings for content, materials, presentation and value to the participant.

TABLE 1. PARTICIPANTS' RESPONSES REGARDING THE OVERALL EFFECTIVENESS OF THE TRAINING PROGRAM

Date of Institute	Excellent	Good	Fair	Poor
October 6-10, 1969	8	12	3	0
December 8-12, 1969	4	12	8	1
January 12-16, 1970	9	12	2	0
Totals	21	36	13	1

TABLE 2. PARTICIPANTS RATING OF THE MAJOR TOPICS
PRESENTED IN THE OCTOBER 6-10, 1969
TRAINING INSTITUTE

Topics	Content				Materials				Presentation				Value to Participant			
	E*	G	F	P	E	G	F	P	E	G	F	P	E	G	F	P
Systems Analysis	8	14	5	0	6	12	6	0	7	13	5	1	5	13	7	0
Management Information Systems	10	10	7	0	7	11	9	0	5	12	9	0	3	13	10	0
Planning, Programming, Budgeting Systems	19	4	3	0	15	8	3	0	18	5	3	0	15	8	3	0
Program Evaluation Review Techniques	20	5	1	0	19	6	1	0	18	7	1	0	19	5	2	0
Totals	57	33	16	0	47	37	19	0	48	37	18	1	42	39	22	0

*E-Excellent, G-Good, F-Fair, P-Poor

TABLE 3. PARTICIPANTS RATING OF THE MAJOR TOPICS
PRESENTED IN THE DECEMBER 8-12, 1969
TRAINING INSTITUTE

Topics	Content				Materials				Presentation				Value to Participant			
	E*	G	F	P	E	G	F	P	E	G	F	P	E	G	F	P
Systems Analysis	5	11	8	0	2	6	11	4	4	8	10	3	4	11	9	0
Management Information Systems	1	18	6	0	2	10	10	3	3	12	8	2	2	13	10	0
Management Analysis System-Cost Effectiveness	1	16	6	3	2	11	10	3	5	11	7	3	3	13	7	3
Planning, Programming, Budgeting Systems	10	13	2	0	11	11	3	0	6	16	2	1	8	13	4	0
Program Evaluation Review Techniques	18	4	1	0	18	5	0	0	18	4	1	0	14	7	1	1
Totals	35	62	23	3	35	43	34	10	36	51	28	9	31	67	31	4

*E-Excellent, G-Good, F-Fair, P-Poor

TABLE 4. PARTICIPANTS RATING OF THE MAJOR TOPICS
PRESENTED IN THE JANUARY 12-16, 1970
TRAINING INSTITUTE

Topics	Content				Materials				Presentation				Value to Participant			
	E*	G	F	P	E	G	F	P	E	G	F	P	E	G	F	P
Systems Analysis	8	16	5	0	7	18	4	0	4	17	8	0	5	14	9	1
Management Information Systems	12	16	2	0	8	19	3	0	6	19	4	1	10	16	4	0
Management Analysis System-Cost Effectiveness	12	19	3	1	10	17	1	2	10	15	4	1	10	13	5	2
Planning, Programming, Budgeting Systems	17	11	1	1	18	10	2	0	17	10	3	0	13	15	1	1
Program Evaluation Review Techniques	25	5	0	0	25	5	0	0	25	5	0	0	15	15	0	0
Totals	74	67	11	2	68	69	10	2	62	66	19	2	53	63	19	4

*E-Excellent, G-Good, F-Fair, P-Poor

TABLE 5. PARTICIPANTS RATING OF THE MAJOR TOPICS
PRESENTED FOR ALL THREE TRAINING INSTITUTES

Topics												
	E*	G	F	P	E	G	F	P	E	G	F	P
Systems Analysis	21	41	18	0	15	36	21	4	15	38	23	4
Management Information Systems	23	44	15	0	17	40	22	3	14	43	21	3
Management Analysis System-Cost Effectiveness	13	35	9	4	12	28	11	5	15	26	11	4
Planning, Programming, Budgeting Systems	46	28	6	1	44	29	8	0	41	31	8	1
Program Evaluation Review Techniques	63	14	2	0	62	16	1	0	61	16	2	0
Totals	166	162	50	5	150	149	63	12	146	154	65	12
									126	169	72	8

*E-Excellent, G-Good, F-Fair, P-Poor

On-site Visitations

Follow-up on-site visitations were conducted for a selected group of participants. The purpose of the visitations was to gain an assessment of the long-range benefits of the training institutes in terms of the participants utilization of the concepts in practice within their resident organizations.

Table 6 lists the name, title, organization, and address of each participant visited in the second type of evaluation.

TABLE 6. NAME AND TITLE OF
PARTICIPANTS VISITED
BY ORGANIZATION AND
ADDRESS

Name and Title	Organization and Address
Andrews, James Assistant Director School Services Bureau	Syracuse University Syracuse, New York 13210
Bollmer, Barbara Assistant Registrar	Western New Mexico University Silver City, New Mexico 88061
Deever, Merwin R. Director, Bureau of Educational Research & Services	Arizona State University Tempe, Arizona 85281
Dennis, David Director of Research	Western New Mexico University Silver City, New Mexico 88061
Johnson, Scott Systems Analyst	North Carolina Board of Higher Education, 1307 Glenwood Avenue Raleigh, North Carolina 27606
Laverty, Grace Director of the Division-Cooperative Research Studies	Department of Education State of Pennsylvania Bureau of Research, 226 E. N. Arlington Ave. Harrisburgh, Pennsylvania 17104

**TABLE 6. NAME AND TITLE OF
PARTICIPANTS VISITED
BY ORGANIZATION AND
ADDRESS (Continued)**

Name and Title	Organization and Address
Newell, Dwight Dean, College of Education	San Francisco State College San Francisco, California
Samph, Thomas Research Coordinator School of Education	Syracuse University Syracuse, New York 13214
Self, Melvin Consultant in Special Pro- jects, Division of Planning, Research and Evaluation	Maryland Department of Edu- cation, 301 W. Preston Street Baltimore, Maryland 21201
Smith, Bill Adm. Associate	Learning Research & Development Center, 160 North Craig Pittsburgh, Pennsylvania 15213
Smith, Joe Associate Superintendent	Arizona State Department of Public Instruction Phoenix, Arizona 85007
Still, Richard C. Assistant Dean School of Education	Stanford University Stanford, California 94305
Thomas, Jack E. Administrative Officer	Stanford University Center for Research and Develop- ment, Stanford, California 94305
Wall, Bob Director, Research and Evaluation	Towson College Towson, Maryland

Table 7 furnishes data relative to the participants general knowledge and understanding, after a period of time had lapsed in each of the major topics presented in the institutes. Of the 14 individual participants included in the on-site evaluations, most were judged to have a high level of general understanding in the major topic areas.

TABLE 7. RANGE OF DEFINITIONAL UNDERSTANDING OF PARTICIPANTS INTERVIEWED BY THE FOUR TOPICS OF THE TRAINING INSTITUTE

Topics	Highest 5	4	3	2	Lowest 1
System Analysis	8	5	0	1	0
Management Information Systems	6	7	0	1	0
Planning Program- ming Budgeting Systems	7	6	1	0	0
Program Evaluation Review Technique	7	6	1	0	0
Totals	28	24	2	2	0

In Table 8 information is presented relative to the participants knowledge of the general components and/or steps in each of the four major topics presented in the institutes. The participants evaluated indicated a satisfactory knowledge of these components and/or steps.

TABLE 8. RANGE OF INTERVIEWEE'S KNOWLEDGE OF GENERAL COMPONENTS OR STEPS IN EACH OF THE FOUR MAJOR TOPICS PRESENTED IN THE TRAINING INSTITUTES

Topics	Highest 5	4	3	2	Lowest 1
Systems Analysis	8	3	2	1	0
Management Information Systems	6	7	0	1	0
Planning Program- ming Budgeting Systems	7	6	1	0	0
Program Evaluation Review Techniques	7	6	0	1	0
Totals	28	22	3	3	0

As indicated in Table 9, most of the participants were somewhat familiar with the topic areas prior to the institutes. However, the level of understanding appeared to be minimal, as judged by information obtained in the interview.

**TABLE 9. FAMILIARITY OF INTERVIEWEE
WITH THE FOUR MAJOR TOPICS
PRESENTED IN THE INSTITUTE
PRIOR TO THE TRAINING PROGRAM**

Topics	Yes	No
Systems Analysis	10	4
Management Information Systems	10	4
Planning Programming Budgeting System	10	4
Program Evaluation Review Techniques	9	5
Totals	39	21

Table 10 displays data which indicates some use of the major subjects discussed in the institutes prior to the institutes but a much larger use of these subjects after the institutes. The increase in use more than doubled following the institute programs. Also, data in Table 11 indicates substantial use is forecasted by the sampled participants in the future.

TABLE 10. USE OF TECHNIQUES RELATED TO THE FOUR MAJOR TOPICS OF THE TRAINING INSTITUTE PRIOR TO THE INSTITUTE AND USE OF THE TECHNIQUES AFTER THE INSTITUTE

Topics	Use of Techniques Prior to Institute		Use of Techniques After the Institute	
	Yes	No	Yes	No
Systems Analysis	7	7	13	1
Management Information Systems	2	12	8	6
Planning Programming Budgeting Systems	2	12	8	6
Program Evaluation Review Techniques	6	8	9	5
Totals	17	39	38	18

**TABLE 11. INTERVIEWEE'S ANTICIPATED
FUTURE USE OF THE TECHNIQUES
IN THE FOUR MAJOR TOPICS OF
THE INSTITUTE**

Topics	Yes	No
Systems Analysis	14	0
Management Information Systems	13	1
Planning Programming Budgeting System	10	4
Program Evaluation Review Techniques	11	3
Totals	48	8

In the next four tables (Tables 12, 13, 14, and 15) data is presented concerning the attitudes of the sampled participants toward the utilization of the major topics in their particular areas of responsibility. Thirteen additional reports were written by those sampled in the four topic areas as reported in Table 12. The four major topics have been included or will be included in university curricula, either as separate courses or integrated into other courses at the undergraduate and graduate level as depicted in Table 13. Each sampled participant viewed the major topics as being a helpful educational management tool (Table 14). Most of the sampled participants were stimulated to engage in further study (Table 15), either by going to other institutes, acquire other materials, and discuss topics with other persons. For example, in the PERT area 10 of the 14 persons sampled sought additional resource materials to expand and increase their knowledge of this subject.

**TABLE 12. PREPARATION OF WRITTEN REPORTS
IN THE FOUR MAJOR TOPICS OF THE
INSTITUTE**

Topics	Yes	No
Systems Analysis	5	9
Management Information Systems	3	11
Planning Programming Budgeting System	2	12
Program Evaluation Review Techniques	3	11
Totals	13	43

**TABLE 13. INCORPORATION OF THE FOUR MAJOR
TOPICS PRESENTED IN THE INSTITUTE
IN LECTURES AND/OR UNIVERSITY
COURSES BY LEVEL**

Topics	Undergraduate	Graduate		
		Masters	6th Year	Doctorate
Systems Analysis	3	3	2	4
Management Information Systems	2	3	2	3
Planning Programming Budgeting System	3	4	3	3
Program Evaluation Review Techniques	2	4	4	4
Totals	10	14	11	14

TABLE 14. INTERVIEWEE'S CONCEPT OF THE FOUR MAJOR TOPICS PRESENTED IN THE INSTITUTE AS A HELPFUL EDUCATIONAL MANAGEMENT TOOL

Topics	Yes	No
Systems Analysis	14	0
Management Information Systems	14	0
Planning Programming Budgeting System	14	0
Program Evaluation Review Techniques	12	2
Totals	54	2

TABLE 15. FURTHER STUDY IN THE FOUR MAJOR TOPICS PRESENTED IN THE INSTITUTE BY TYPE OF STUDY

Topics	Attendance in Other Institutes	Acquisition of Other Reference Materials	Discussion of Topics With Other Persons
System Analysis	8	12	13
Management Information System	8	10	10
Planning Programming Budgeting System	9	9	9
Program Evaluation Review Techniques	5	10	10
Totals	30	40	42

This chapter presented the findings of both types of evaluation employed in these institutes (the weekly training institutes and on-site visitations). The next chapter provides a summary, conclusion, and recommendation for the training program in educational management tools.

TABLE 12. INTERVIEW TOPICS BY TYPE OF STUDY

Topic	Yes	No
System Analysis	14	0
Management Information System	14	0
Planning Programming Budgeting System	10	0
Program Evaluation Review Techniques	11	0
Total	38	0

TABLE 13. FURTHER STUDY IN TWO FOUR
MAJOR TOPICS PRESENTED IN THE IN-

THE INSTITUTE BY TYPE OF STUDY

Topic	Attendance in Other Institutes	Attendance in Institute or Other Personnel	Discussion of Topics With Other Personnel
System Analysis	5	12	13
Management Information System	8	10	10
Planning Programming Budgeting System	9	9	9
Program Evaluation Review Techniques	2	10	10
Total	30	40	42

CHAPTER IV

SUMMARY, CONCLUSIONS, and RECOMMENDATIONS

Summary

The purpose of this grant was to conduct a training program in selected management tools for educational personnel having major responsibilities for research and development activities. The five instructional topics (systems analysis, management information systems, management analysis planning programming budgeting systems, and program evaluation and review techniques) were selected as being useful to educational researchers and other administrative personnel in the management areas of planning, decision making, and evaluation. The major objective of training program was to instill in each participant general knowledge and skill required in the application of these management tools to the daily operation of project management and school system operation. Subordinate objectives were:

1. Define what is meant by system analysis and list the basic steps related to system analysis procedures.
2. Define the meaning of the Management Information System (MIS), list the major component parts of an educational management information system and list the basic steps in implementing an MIS in practice.
3. Define Program Planning Budgetary System (PPBS) and list the component parts of PPBS and describe various implementation considerations.
4. Define Program Evaluation Review Techniques (PERT) and list the basic elements of PERT and prepare a PERT network from a simulated problem situation.

A training program announcement letter and application brochure was mailed to a selected group of potential participants. A total of ninety candidates, thirty for each weekly institute, were notified that they had been selected to attend the program. Unforeseen schedule difficulties resulted in actual attendance as follows: (1) 30 in the October 6-10 institute, (2) 26 in the December 8-12 institute, and (3) 32 in the January 12-16 institute (see Appendix E for weekly participant listings). States represented in the three institutes were: (1) 20 in October 6-10, (2) 16 in December 8-12, and (3) 26 in January 12-16. A total of 35 different states were represented in the three institutes. Table 16 displays the types of institutes represented by each weekly institute.

**TABLE 16. INSTITUTIONS AND AGENCIES
REPRESENTED BY PARTICIPANTS**

Type of Institution or Agency	October 6-10	December 8-10	January 12-16	Totals
Regional Education Laboratories	1	2	1	4
State Educational Agencies	8	2	4	14
Local Educational Agencies	2	5	5	12
Higher Education Research	10	6	7	23
Higher Education Professors	3	9	5	17
Higher Education Administrators	6	2	9	17
Other (Kentucky Child Welfare Foundation)			1	1
Totals	30	26	32	88

A wide range of research personnel, representing various levels of educational institutions and agencies and professional responsibilities attended the institutes. The 88 participants represented 80 different agencies and institutions from throughout the United States.

Conclusions

The following conclusions are based upon the data provided in narrative and table form in Chapter III. Many conclusions have been evident to the reader throughout the previous chapter and no attempt is made to state further conclusions on many of these issues. However, the following two general conclusions seem most pertinent to this training program.

1. It is significant to note, in terms of over-all effectiveness, that 60 of 74 responses by the participants rated the training program as being good and excellent. Also, totally for all three institutes, the participants rated the instruction in each of the five topics as follows:

(1) content---excellent/good 328 and fair/poor 55,
 (2) materials---excellent/good 299 and fair/poor 75,
 (3) presentation---excellent/good 300 and fair/poor 77,
 and (4) value to the participant---excellent/good 395 and
 fair/poor 80. Therefore, it seems reasonable to conclude
 that the instructional procedures were well received by
 a large majority of the participants.

2. The 14 participants included in the selected sample for on-site visitations exhibited a high degree of definitional understanding in each of the major topic areas as judged by the on-site evaluators. The sampled participants provided responses to the on-site evaluator that indicated a high level of knowledge and understanding relative to the basic components and steps inherent in each of the major training topics. The on-site evaluator also received data from the sampled participants that indicated an increased interest in educational management tools in their home environment through: (1) utilization in their current program operations, (2) inclusion or the addition of the topic areas in university and college curricula, and (3) additional in-service education opportunities. Apparently, the knowledge and skill acquired in the training institutes is being utilized within the sampled participants home organization. If the sampled participants can be assumed to be representative of the total group of participants then it may be assumed that the training program has had a noticeable effect in the field.

Recommendations

From the experience gained in preparation for, conducting, and evaluation of the three weekly training programs, the following recommendations are offered.

1. Because of the different kinds of problem situations encountered by each group, separate training programs should be conducted for the various professional interests. A suggested grouping would be:
 - a. School (LEA, SEA) administrators and research personnel.
 - b. Regional lab and research-development personnel.
 - c. College and university teaching personnel.
 - d. College and university administrators and research personnel.
2. At this point in time, more than a survey type course is needed. Future programs should be more intensely focused in a given area aimed at functional implementation. A suggested three week seminar would include:

a. Week one: Systems Theory and Analysis Methods.

b. Week two: Management Information Systems

c. Week three: Planning, Programming, Budgeting and Evaluating System (PPBES).

3. To encourage greater commitment by the participants and the sending institutions a portion of the program cost should be born by the participant or his agency. This would also allow some provision for informal activities.

4. Adequate facilities are a requisite to a good training program. Seminar type arrangements and an "after-class" discussion area are suggested.

5. Functional management systems are receiving greater attention by educational agencies and institutions. From the response to this program, there is indicated a felt need for training in management tools at all levels of education. Future programs of both the in-service and pre-service approach, should be encouraged by the USOE. However, the University because of its unique capabilities should be the primary developer of such educational programs. Encouragement, through funding, should be given to utilize a multi-discipline approach (e.g., Management, Education, Design, Data Processing) within the existing faculty.

Recommendations

From the experience gained in preparation for, conducting, and evaluation of the three weekly training programs, the following recommendations are offered.

1. Because of the different kinds of problem situations encountered by each group, separate training programs should be conducted for the various professional interests. A suggested grouping would be:

a. School (LEA, SEA) administrators and research personnel.

b. Regional lab and research-development personnel.

c. College and university teaching personnel.

d. College and university administrators and research personnel.

2. At this point in time, more than a survey type course is needed. Future programs should be more intensely focused in a given area aimed at functional implementation. A suggested three week seminar would include:

APPENDIX A

ANNOUNCEMENT LETTER AND APPLICATION BROCHURE

Southern Illinois
University

CARBONDALE, ILLINOIS 62901

College of Education
SCHOOL SERVICES BUREAU

July 22, 1969

Dear Educational Administrator:

We are writing to tell you about three one-week training institutes in educational management tools and inviting you or your representative to participate in this program with us.

Systems analysis, management information systems, and other planning systems are management tools which have greatly aided managers in business and government in meeting the demands of their organizations. Now these management tools are helping educational researchers and administrators.

To provide an opportunity for educational leaders in research and educational administration to learn more about these management tools and to show how these tools may be applied to educational programs and project management, the School Services Bureau, College of Education, Southern Illinois University, and the Research Training Branch, Bureau of Research, U.S. Office of Education, have planned a series of one-week training institutes. These training institutes will illustrate management tools concepts and will provide the participants the opportunity to explore the use of these tools in attacking their own problems.

Additional details of these institutes are outlined in the enclosed brochures. We believe that you or your representative may be interested in attending or you may know of others who are. Please complete the requested information or forward to the most appropriate person for completion and return to us for processing and assignment of personnel to specific training institutes.

We look forward to hearing from you.

Sincerely yours,



Sam W. Bliss
Program Director

Enclosure - 1

SWB:mpk

An Educational Research Training Program In Management Tools for Educational Research Leaders

**SPONSORED BY
SCHOOL SERVICES BUREAU
COLLEGE OF EDUCATION
SOUTHERN ILLINOIS UNIVERSITY**

**AND
RESEARCH TRAINING BRANCH
BUREAU OF RESEARCH
U.S. OFFICE OF EDUCATION**

PURPOSE

This research training program is to train educational personnel having major responsibilities for research and development programs and other educational leaders in the use of selected management tools which are useful in educational planning, decision-making, and evaluation aspects of school operation. Following participation in the training program, the participants should be able to apply these management tool concepts to research projects, instruct other research oriented personnel in the basic concepts, and disseminate information about the use of the concepts in the management process.

Instructional Topics

Research Planning and Management
General System Concepts
Management Information Systems
Planning, Programming Budgetary Systems
Program Evaluation Review Techniques

Who May Apply for Participation

The selection of participants will be based upon the individual's present or anticipated leadership position in planning, directing, and controlling research and development activities within the participants own institution. Preference will be given to administrators and directors of research and development programs, college of education personnel (deans, bureau directors, department chairmen, professors of educational administration, etc.), and administrators and directors of federally supported research projects. Other applications will be considered if vacancies are available.

Because of the need for close instructor-participant interaction, each session will be limited to an enrollment of approximately thirty persons.

Notification

Notification of acceptance and placement in a

specific session will be communicated to each participant approximately six weeks in advance of the desired session in order to improve the possibility of attendance at the preferred date.

Stipend and Travel Allowance

All participants attending a full five-day training session will receive a travel allowance for one round trip between place of residence and the training institution.

A stipend of \$75 will be provided for each participant who attends the full five-day training session.

Training Program Staff

Southern Illinois University staff and visiting professionals with special expertise in the training topics will form the instructional staff. Four visiting lecturers will keynote each major topic area and be available for discussion with session participants. Southern Illinois University staff will supplement the visiting lectures and consist of personnel from the Department of Management, Data Processing and Computer Center, School of Technology, and Department of Educational Administration and Foundations.

Where

Each training session will be conducted at the Morris Library Auditorium, Southern Illinois University, Carbondale, Illinois.

When

Each training session will be for a full five-day week. Three training sessions will be held. The dates of each training session are:

<i>Application Deadline</i>	<i>Session Dates</i>
August 25, 1969	October 6-10, 1969
October 27, 1969	December 8-12, 1969
December 1, 1969	January 12-16, 1970

APPLICATION FORM

Dr. _____
 Mr. _____
 Mrs. _____
 Miss _____

First _____ Middle _____ Last _____

Address _____
 Number _____ Street _____

City _____ State _____ Zip Code _____

Telephone _____ Birthdate _____
 Area _____ Month _____ Day _____ Year _____

Education: Please check and complete for highest level achieved.
☐ Bachelor's ☐ Master's ☐ Sixth Year ☐ Doctorate

Institution _____
 Name _____

Address _____

Date Attended (from-to) _____

Major Field of Study _____

Degree and Year Granted _____ Degree _____ Year _____

Current Employment _____

Employer _____
 Name _____

Address _____
 Number _____ Street _____

City _____ State _____ Zip Code _____

Position or Title _____

Please submit additional information on separate paper for the following three items:

1. Briefly describe your present or anticipated responsibility for research and development programs.
2. Briefly describe your background in educational training and experience in the field.
3. Specify briefly any previous or current training and/or experience in the management tool areas (systems concepts, management information systems, Program Planning Budgeting Systems, and Program Evaluation Review Techniques).

Choice of Attendance Dates:

Please indicate three choices of attendance, use 1 for first choice date, 2 for second choice, and 3 for third.

☐ October 6-10, 1969

☐ December 8-12, 1969

☐ January 12-16, 1970

For additional information please contact or mail applications and inquiries to:

Dr. Sam W. Bliss, Program Director
 School Services Bureau
 College of Education
 Southern Illinois University
 Carbondale, Illinois 62901
 Telephone: 618/453-5733

APPENDIX B

EDUCATIONAL MANAGEMENT TOOLS
TRAINING PROGRAM FACULTY

EDUCATIONAL MANAGEMENT TOOLS
TRAINING PROGRAM FACULTY

Systems Theory and Concepts

Dr. Nelson Haggerson
Chairman, Department of Secondary Education
Arizona State University

Mr. William Gould
Lecturer, Department of Design
Southern Illinois University

Management Information Systems

Dr. Fred K. Bellott
Director, Bureau of Educational Research and Services
Memphis State University

Dr. Thomas D. Purcell
University Director, Data Processing and Computer Center
Southern Illinois University

Mr. B. D. Cross
Director, Data Processing and Computer Center
Southern Illinois University

Mr. Larry Hengehold
Coordinator, Data Processing and Computer Center
Southern Illinois University

Management Analysis Systems

Dr. Robert E. Schellenberger
Chairman, Department of Management
Southern Illinois University

Planning, Programming, Budgeting, Evaluating System

Dr. William Curtis
Project Director, Research Corporation
Association of School Business Officials

Dr. Robert E. Schellenberger
Chairman, Department of Management
Southern Illinois University

Program Evaluation and Review Technique

Dr. Desmond Cook
Director, Educational Research Management Center
Ohio State University

Mr. Kirby Madden
Instructor, Department of Management
Southern Illinois University

APPENDIX C

WEEKLY INSTRUCTIONAL SCHEDULES

TRAINING PROGRAM IN MANAGEMENT TOOLS SCHEDULE

October 5-10, 1969

October 5 - 6:00-9:00 p.m.

Registration at Best 7 Inn

October 6 - Monday

8:30 a.m.

Welcome - Clark

8:50 a.m.

Housekeeping details

9:15 a.m.

Systems Theory - Haggerson

10:30 a.m.

Coffee Break

10:45 a.m.

Discussion and Questions - Haggerson

11:15 a.m.

Systems Theory Concepts - Gould

11:45 a.m.

Luncheon

12:45 p.m.

System Theory Concepts - Gould

2:30 p.m.

Coffee Break

3:00 p.m.

System Theory Concepts - Gould

October 7 - Tuesday

8:30 a.m.

Opening and Introductions

8:45 a.m.

Management Information Systems - Bellott

10:15 a.m.

Coffee Break

10:30 a.m.

Discussion and Questions

11:00 a.m.

MIS - Purcell and Cross

11:45 a.m.

Luncheon

12:45 p.m.

MIS - Purcell and Cross

2:30 p.m.

Coffee Break

2:45 p.m.

MIS - Purcell and Cross

October 8 - Wednesday

8:30 a.m.

Opening of Session

8:45 a.m.

MIS - Purcell and Cross

10:15 a.m.

MIS - Purcell and Cross

11:45 a.m.

Luncheon

12:45 p.m.

MIS - Purcell and Cross

2:30 p.m.

Coffee Break

2:45 p.m.

MIS - Purcell and Cross

October 9 - Thursday

8:30 a.m.

Opening and Introductions

8:45 a.m.

PPBS - Curtis

10:15 a.m.

Coffee Break

10:30 a.m.

PPBS - Curtis and Chambers

11:45 a.m.

Luncheon

12:45 p.m.

PPBS - Schellenberger

2:30 p.m.

Coffee Break

2:45 p.m.

PPBS - Schellenberger

October 10 - Friday

8:30 a.m.

Opening and Introduction

8:45 a.m.

PERT - Cook

10:15 a.m.

PERT - Madden

11:45 a.m.

Luncheon

12:45 p.m.

PERT - Maddent

2:30 p.m.

Coffee Break

2:45 p.m.

Discussion and Evaluation

4:30 p.m.

Adjournment of Institute

TRAINING PROGRAM IN MANAGEMENT TOOLS SCHEDULE

December 7-12, 1969

December 7 - 12 noon

Registration Begins at Best 7 Inn

December 8 - Monday

8:15 a.m.	Bus leaves motel <u>Each Morning</u>
8:30 a.m.	Housekeeping Details - Jones
8:45 a.m.	Welcome - Dean Clark
9:00 a.m.	Program Objectives and Plan - Bliss
9:15 a.m.	Systems Theory Overview - Haggerson
10:15 a.m.	Coffee Break
10:45 a.m.	Discussion and Questions - Haggerson
11:15 a.m.	Systems Theory Concepts - Gould
11:45 a.m.	Lunch
1:15 p.m.	Systems Theory Concepts - Gould
2:30 p.m.	Coffee Break
3:00 p.m.	Systems Theory Concepts - Gould
5:00 p.m.	Bus Departs

December 9 - Tuesday

8:30 a.m.	Management Information Systems - Bellott
10:00 a.m.	Coffee Break
10:30 a.m.	Discussion and Questions - Bellott
11:00 a.m.	MIS Development - Purcell
11:45 a.m.	Lunch
1:15 p.m.	MIS Development - Cross
2:30 p.m.	Coffee Break
3:00 p.m.	MIS Development - P-C and Co.
5:00 p.m.	Bus Departs

December 10 - Wednesday

8:30 a.m.	Management Analysis System - Schellenberger
10:00 a.m.	Coffee Break
10:30 a.m.	Discussion and Questions - Schellenberger
11:45 a.m.	Self-Initiated Projects and Independent Study (Bus Departs)

December 11 - Thursday

8:30 a.m.	P.P.B.E.S. - Curtis
10:00 a.m.	Coffee Break
10:30 a.m.	P.P.B.E.S. - Curtis
11:45 a.m.	Lunch
1:15 p.m.	P.P.B.E.S. - Schellenberger
2:30 p.m.	Coffee Break
3:00 p.m.	Discussion and Questions - Curtis & Schellenberger
5:00 p.m.	Bus Departs

December 12 - Friday

8:30 a.m.	PERT - Cook
10:00 a.m.	Coffee Break
10:30 a.m.	PERT - Cook
11:45 a.m.	Lunch
1:15 p.m.	PERT - Madden
2:30 p.m.	Coffee Break
3:00 p.m.	Discussion and Questions
3:30 p.m.	Summary - Bliss
	RETURN EVALUATIONS

TRAINING PROGRAM IN MANAGEMENT TOOLS SCHEDULE

January 11-16, 1970

January 11 - 1:00-10:30 p.m. Registration at Best 7 Inn
(Nothing Planned for Group)

January 12 - Monday

8:15 a.m.	Bus leaves motel Each Morning
8:30 a.m.	Housekeeping Details - Jones
8:45 a.m.	Welcome - Dean Clark
9:00 a.m.	Program Objectives and Plan - Bliss
9:15 a.m.	Systems Theory Overview - Haggerson
10:15 a.m.	Coffee Break
10:45 a.m.	Discussion and Questions - Haggerson
11:15 a.m.	Systems Theory Concepts - Gould
11:45 a.m.	Lunch
1:15 p.m.	Systems Theory Concepts - Gould
2:30 p.m.	Coffee Break
3:00 p.m.	Systems Theory Concepts - Gould
5:00 p.m.	Bus Departs

January 13 - Tuesday

8:30 a.m.	Management Information Systems - Bellott
10:00 a.m.	Coffee Break
10:30 a.m.	Discussion and Questions - Bellott
11:45 a.m.	Lunch
1:15 p.m.	MIS Development - Purcell
2:30 p.m.	Coffee Break
3:00 p.m.	MIS Development - Cross, Huck
5:00 p.m.	Bus Departs

January 14 - Wednesday

8:30 a.m.	Management Analysis System - Schellenberger
10:00 a.m.	Coffee Break
10:30 a.m.	Discussion and Questions - Schellenberger
11:45 a.m.	(Bus Departs)

January 15 - Thursday

8:30 a.m.	P.P.B.E.S. - Curtis
10:00 a.m.	Coffee Break
10:30 a.m.	P.P.B.E.S. - Curtis
11:45 a.m.	Lunch
1:15 p.m.	P.P.B.E.S. - Schellenberger
2:30 p.m.	Coffee Break
3:00 p.m.	Discussion and Questions - Curtis & Schellenberger
5:00 p.m.	Bus Departs

January 16 - Friday

8:30 a.m.

10:00 a.m.

10:30 a.m.

11:45 a.m.

1:15 p.m.

2:30 p.m.

3:00 p.m.

3:30 p.m.

PERT - Cook

Coffee Break

PERT - Cook

Lunch

PERT - Madden

Coffee Break

Discussion and Questions

Summary - Bliss

RETURN EVALUATIONS

WEEKLY EVALUATION FORM

EDUCATIONAL MANAGEMENT TOOLS PROGRAM

Program Evaluation

An objective of the Management Tools Program is to provide a high level introductory perception of selected management systems, concepts and problems as they apply to the educational situation.

1. How successfully was this objective met?

(Circle one: EXCELLENT

GOOD

FAIR

POOR

NOT AT ALL)

Please comment:

2. Will you rate by number, each of the following, adding your personal comments.
(1 - Excellent; 2 - Good; 3 - Fair; 4 - Poor)

	<u>Content</u>	<u>Materials</u>	<u>Presentation</u>	<u>Value to you</u>
A. SYSTEMS THEORY	_____	_____	_____	_____
1. Nelson Haggerson (Your comments)	_____	_____	_____	_____
2. WILLIAM GOULD (Your Comments)	_____	_____	_____	_____
B. MANAGEMENT INFOR MATION SYSTEMS	_____	_____	_____	_____

(1 - Excellent; 2-Good; 3-Fair; 4-Poor)

	<u>Content</u>	<u>Materials</u>	<u>Presentation</u>	<u>Value to you</u>
1. FRED BELLOTT (Your comments)	_____	_____	_____	_____
2. TOM PURCELL (Your comments)	_____	_____	_____	_____
3. BUD CROSS (Your comments)	_____	_____	_____	_____
4. LARRY HENSEWOLD (Your comments)	_____	_____	_____	_____
C. MANAGEMENT ANALYSIS	_____	_____	_____	_____
1. ROBERT SCHELLENBERGER (Your comments)	_____	_____	_____	_____
D. P.P.B.S.	_____	_____	_____	_____

-3-

(1 - Excellent; 2-Good; 3-Fair; 4-Poor)

	<u>Content</u>	<u>Materials</u>	<u>Presentation</u>	<u>Value to you</u>
1. WILLIAM CURTIS (Your comments)	_____	_____	_____	_____
2. ROBERT SCHELLENBERGER (Your comments)	_____	_____	_____	_____
E. PERT	_____	_____	_____	_____
1. DESMOND COOK (Your comments)	_____	_____	_____	_____
2. KIRBY MADDEN (Your comments)	_____	_____	_____	_____

3. We would appreciate your comments toward improvement of future programs:

-4-

Your comments on:

Lodging

You may sign here if you wish

THANK YOU!

40

APPENDIX E

ON-SITE EVALUATION FORM

ON-SITE
EVALUATION SCHEDULE

TRAINING PROGRAM
FOR
EDUCATIONAL MANAGEMENT TOOLS

1969 - 1970
SOUTHERN ILLINOIS UNIVERSITY
COLLEGE OF EDUCATION
SCHOOL SERVICES BUREAU

Name of Interviewee _____

Institution or Agency _____

Position _____

Address _____

Zip _____

Telephone Number Area _____

Interviewer: _____

Date of Interview _____

**EDUCATIONAL MANAGEMENT TOOLS
EVALUATION SCHEDULE**

The purpose of this schedule is to identify and describe the acceptance and utilization of concepts acquired during the Management Tools Training Program. As you will recall, these concepts relate to four areas:

Systems Analysis Techniques
Management Information Systems
Planning, Programming, Budgeting, Evaluating System
Program Evaluation and Review Technique

The questions which follow are designed to assist you in establishing the extent of the utilization of the four topic area of the Training program. Circle the number which most nearly approaches the level of utilization. One (1) is lowest and five (5) is highest. Circle either yes or no where indicated with additional information requested.

I. SYSTEMS ANALYSIS TECHNIQUES

1. Does the interviewee have a general understanding of the definition of Systems Analysis? 1 2 3 4 5

2. Is the interviewee able to describe the general steps or phases involved in system analysis techniques? 1 2 3 4 5

3. Was interviewee familiar with Systems Analysis prior to the training program? Yes No

4. Had interviewee used Techniques prior to program?
Yes No (List Examples)

5. Has he used Techniques since the program?
Yes No (List Examples)

6. Does he anticipate continued or future use?
Yes No (List Examples)

7. Has the interviewee prepared a written report on Systems Analysis for any other staff in his organization? Yes No (If possible we would appreciate a copy.)

8. Has interviewee incorporated Systems Analysis Concepts in lectures or courses for students? Yes No (If yes, give course titles and level, e.g. Masters, 6th Year, Doctorate, Undergraduate: Fr. So. Jr. Sr.)
9. Have any proposals been made or anticipated for conducting a seminar or institute in Systems Analysis? Yes No
If Yes:
a. Proposed dates: _____
b. Proposed location: _____
c. Proposed group to be reached: _____
10. Does interviewee view Systems Analysis as a helpful Educational Management Tool? Yes No
11. Was interviewee motivated to study Systems Analysis further as a result of his exposure at the Management Tools Program?
Yes No
If Yes:
a. attend other institutes _____
b. acquire reference material _____
c. discuss with other knowledgeable persons _____

II. MANAGEMENT INFORMATION SYSTEMS

1. Does the interviewee have an understanding of the nature and scope of MIS? 1 2 3 4 5
2. Is the interviewee able to describe the general procedures involved in establishing an integrated MIS? 1 2 3 4 5
3. Was the interviewee familiar with MIS prior to the training program?
Yes No
4. Had the interviewee been actively involved with MIS prior to the training program? Yes No (List examples)
5. Has he been involved with MIS subsequent to the training program?
Yes No (List examples)

6. Does he anticipate continued or future implementation?
Yes No (List examples)
7. Has the interviewee prepared a written report on MIS for any other staff in his organization? Yes No (If possible we would appreciate a copy.)
8. Has interviewee incorporated MIS concepts in lectures or courses for students? Yes No (If Yes, give course titles and level, e.g. Masters, 6th Year, Doctorate, Undergraduate; Fr. So. Jr. Sr.)

9. Have any proposals been made or anticipated for conducting a seminar or institute in MIS?
Yes No
a. Proposed dates: _____
b. Proposed location: _____
c. Proposed group to be reached: _____
10. Does interviewee view MIS as a helpful management tool?
Yes No
11. Was interviewee motivated to study MIS further as a result of his exposure at the Management Tools Program? Yes No
If Yes:
a. attend other institutes _____
b. acquire reference material _____
c. discuss with other knowledgeable persons _____
12. Is interviewee familiar with the WICHE Project? Yes No

III. PLANNING, PROGRAMMING, BUDGETING, EVALUATING SYSTEMS

1. Does the interviewee have an understanding of the nature and scope of PPBES? 1 2 3 4 5
2. Is the interviewee able to describe the basic components and processes involved with PPBES? 1 2 3 4 5

3. Was the interviewee familiar with PPBES prior to the training program? Yes No
4. Had the interviewee been actively involved with PPBES prior to the training program? Yes No (List examples)
5. Has he been involved with PPBES subsequent to the training program? Yes No (List examples)
6. Does he anticipate continued or future implementation? Yes No (List examples)
7. Has the interviewee prepared a written report on PPBES for any other staff in his organization? Yes No (If possible we would appreciate a copy.)
8. Has interviewee incorporated PPBES concepts in lectures or courses for students? Yes No (If yes, give course titles and level, e.g. Masters, 6th Year, Doctorate, Undergraduate: Fr. So. Jr. Sr.)
- _____
- _____
- _____
9. Have any proposals been made or anticipated for conducting a seminar or institute in PPBES? Yes No
- a. Proposed dates: _____
- b. Proposed location: _____
- c. Proposed group to be reached: _____
10. Does interviewee view PPBES as a helpful management tool? Yes No
11. What does interviewee see as the major obstacles in implementing PPBES?
- _____
- _____
- _____

12. Was interviewee motivated to study PPBES further as a result of his exposure at the Management Tools Program? Yes No
If Yes, how?
a. attend other institutes _____
b. acquire reference material _____
c. discuss with other knowledgeable persons _____

IV. PROGRAM EVALUATION AND REVIEW TECHNIQUE

1. Does the interviewee have an understanding of the nature and scope of PERT-CPM? 1 2 3 4 5
2. Is the interviewee able to describe the general steps or techniques involved in PERT-CPM? 1 2 3 4 5
3. Was interviewee familiar with PERT-CPM prior to the training program? Yes No (List examples)
4. Had interviewee used the techniques prior to the program? Yes No (List examples)
5. Has he used PERT-CPM since the program? Yes No (List examples)
6. Does he anticipate continued or future use? Yes No (List examples)
7. Has the interviewee prepared a written report on PERT CPM for any other staff in his organization? Yes No (If possible we would appreciate a copy.)
8. Has interviewee incorporated PERT-CPM concepts in lectures or courses for students? Yes No (If Yes, give course titles and level, e.g. Masters, 6th Year, Doctorate, Undergraduate: Fr. So. Jr. Sr.)
9. Have any proposals been made or anticipated for conducting a seminar of institute in PERT-CPM? Yes No
If Yes:
a. Proposed date _____
b. Proposed location _____
c. Proposed group to be reached _____

10. Does interviewee view PERT-CPM as a helpful Educational Management Tool? Yes No
11. Was interviewee motivated to study PERT-CPM further as a result of his exposure at the Management Tools Program? Yes No
If yes, how?
a. attend other institutes _____
b. acquire reference material _____
c. discuss with other knowledgeable persons _____
12. What does interviewee see as the major obstacles in implementing PERT- CPM?

For Interviewer

Additional Comments and Subjective Evaluation

APPENDIX F
LISTING OF PARTICIPANTS ARRANGED BY STATE

EDUCATIONAL RESEARCH TRAINING PROGRAM IN
MANAGEMENT TOOLS FOR EDUCATIONAL
RESEARCH LEADERS

PARTICIPANTS
Oct. 6-10, Dec. 8-12, Jan. 12-16

ALABAMA

Atwell, Charles A. 1001 East Sanford Street Auburn, Alabama 36830	Auburn University Assistant Professor of Education	Dec. 8-12
Jones, Ralph W. 1242 Anchor Drive Mobile, Alabama 36609	University of Southern Alabama Director of Research	Oct. 6-10
Watkins, James F. Box 1872 Auburn, Alabama 36830	Auburn University Assistant Professor/ Field Representative	Jan. 12-16

ARIZONA

Anderson, Keith Waldo 850 North Wilmot Road Tucson, Arizona 85711	University of Arizona Educational Administration/ Director, Bureau of Educational Research and Services	Dec. 8-12
Deever, Merwin R. 407 Aepli Drive Tempe, Arizona 85281	Arizona State University Director, Bureau of Educational Research and Services	Jan. 12-16
Demeke, Howard J. 1026 VeElla Circle Tempe, Arizona 85281	Arizona State University Associate Professor, Educational Administration & Supervision	Jan. 12-16
Smith, Joe C. 304 East McKellips Road Tempe, Arizona 85281	State Department of Public Instruction, Phoenix, Arizona	Jan. 12-16

ARKANSAS

Reese, Clyde State College of Arkansas Conway, Arkansas 72032	State College of Arkansas Chairman, Department of Psychology and Counselor Education	Oct. 6-10
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CALIFORNIA

Banathy, Bela H. 1 Garden Circle Hotel Claremont Berkeley, California 94705	Far West Lab for Educational Research & Development, Berkeley	Oct. 6-10
Brown, Stanley B. San Luis Obispo, Cal- ifornia 93401	California State Polytech College, Research Coordinator Minority Education	Dec. 8-12
Leavitt, Jerome E. School of Education Fresno State College Fresno, California 93726	Fresno State College Professor and Head, Department of Education	Dec. 8-12
Nelson, Jerald W. 2715 De Ovan Stockton, California 95204	University of the Pacific Dean of Instructional Re- search and Records	Oct. 6-10
Newell, Dwight H. 1600 Holloway San Francisco, Cali- fornia 94132	San Francisco State College Dean of School of Education	Jan. 12-16
Shay, Carleton B. 2261 Talmadge Street Los Angeles, Cali- fornia 90027	California State College, Los Angeles, Associate Dean of Education and Coordinator of Graduate Study	Dec. 8-12
Still, Richard C. 730 Santa Maria Stanford, California 94305	Stanford University Assistant Dean, School of Education	Oct. 6-10
Thomas, Jack E. 1760 Bay Road #112 Palo Alto, California 94303	Stanford University Administrative Officer, Center for Research Development	Oct. 6-10

CONNECTICUT

Livak, Frank Howard 7 Ravenwood Road West Hartford, Con- necticut 06107	Connecticut State Department of Education, Education Con- sultant	Dec. 8-12
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FLORIDA

Edgar, David E. 505 Oakridge Avenue Deland, Florida 32730	Orange County School Board Director, Project #6325/ Public School Research	Jan. 12-16
Jacobs, John F. 12299 University Station Gainesville, Florida 32601	University of Florida Assistant Professor, Special Education and Child Psychology	Dec. 8-12

GEORGIA

McGuffey, Carroll W. 122 Baldwin Hall University of Georgia Athens, Georgia 30601	University of Georgia Professor & Director Education Planning and Development Studies	Jan. 12-16
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IDAHO

Wicklund, Lee A. 121 Mesa Drive Pocatello, Idaho 83201	Idaho State University Assistant Professor, Edu- cational Administration	Jan. 12-16
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ILLINOIS

Bowen, Robert 103 Evergreen Lane Mt. Carmel, Illinois 62863	Wabash Community Unit School (Mt. Carmel) Superintendent of Schools	Dec. 8-12
D'Amico, Louis A. 821 Oakwood Avenue Wilmette, Illinois 60091	Northeastern Illinois State College, Director, Research and Development	Oct. 6-10
Hedlund, H. Jean 538 North Euclid Avenue Oak Park, Illinois 60302	Chicago State College Dean of Administration	Jan. 12-16
Kirkhus, Harold P. 3202 North Wisconsin Peoria, Illinois 61603	Peoria Public Schools Director of Research	Oct. 6-10
Milnor, Brent P.O. Box 145 Mt. Zion, Illinois 62549	Mt. Zion Community Unit Schools, Principal	Oct. 6-10
Norwood, Donald C. 2300 Whitefield Road Springfield, Illinois 62704	Office of the Superintendent of Public Instruction	Oct. 6-10

ILLINOIS

Owens, Wayne S. 1012 Woodlawn Drive Charleston, Illinois 61920	Eastern Illinois University Administrative Associate, Office of the Vice President for Develop- ment	Oct. 6-10
Rudolph, James T. 920 South Wheaton Avenue Wheaton, Illinois 60187	Glenbard Township High School District #87, Director of Special Services	Dec. 8-12
Weidhuner, Robert H. 815 Van Buren Charleston, Illinois 61920	Eastern Illinois University Assistant, Administrative Studies	Jan. 12-16

INDIANA

Jerry, Robert H. 2908 Crawford Terre Haute, Indiana 47803	Department of Public Instruction Deputy State Superintendent	Oct. 6-10
Young, John F. 4122 Hiawatha Boulevard Fort Wayne, Indiana 46807	Fort Wayne Community Schools Associate Superintendent	Dec. 8-12

IOWA

Grosz, Willard W. 4418 Ross Road Ames, Iowa 50010	Iowa State University Administrative Assistant to the Dean, College of Education	Oct. 6-10
Mitchell, James E. 8508 Ridgemont Des Moines, Iowa 50322	Iowa State Department of Public Instruction, Director, MSEIP	Jan. 12-16
Sister Mary Helen, CHM Davenport, Iowa 52804	Marycrest College President	Jan. 12-16

KANSAS

Anderson, Robert E. 2724 North Terrace Drive Wichita, Kansas 67220	Wichita State University Director of Educational Field Service	Jan. 12-16
Dean, Harry 120 East 10th Street Topeka, Kansas 66612	Kansas State Department of Education, Director, Informa- tion Systems	Oct. 6-10

KANSAS

Hopson, James A. 9129 Lowell Shawnee Mission, Kansas 66212	Mid-continent Regional Educational Lab, Associate Director, Administration	Dec. 8-12
Koos, Eugenia M. 4907 Neosho Mission, Kansas 66204	Mid-continent Regional Educational Lab, Research Specialist	Dec. 8-12
Miller, Raymond L. 216 Bailey Hall University of Kansas Lawrence, Kansas 66044	University of Kansas Assistant Professor, Educational Administration	Dec. 8-12

KENTUCKY

Gibson, Charles H. 211 Magnolia Drive Richmond, Kentucky 40475	Eastern Kentucky University Assistant Dean, College of Education	Dec. 8-12
Patterson, Charles 506 West Hill Street Louisville, Kentucky 40208	Louisville School System Administrative Assistant to Superintendent	Dec. 8-12
Wilburn, R. G. P.O. Box 714 Frankfort, Kentucky 40601	Kentucky Child Welfare Foundation Inc., Research Associate	Jan. 12-16

LOUISIANA

Blackmon, C. Robert 1206 Lee Avenue Lafayette, Louisiana 70501	University of Southwestern Louisiana, Associate Professor of Education, Coordinator	Oct. 6-10
Firnberg, James Wallace 810 North Rothmere Drive Baton Rouge, Louisiana 70808	Louisiana State University System Assistant Professor of Education, Coordinator, Institution Research	Jan. 12-16

MARYLAND

Self, Melvin L. 301 West Preston Street Baltimore, Maryland 21201	Maryland State Department of Education, Consultant in Educational Technology	Oct. 6-10
Wall, Robert E. Box 40, RR 2 Sparks-Glencoe, Maryland 21152	Towson State College Director of Research & Evaluation	Jan. 12-16

MICHIGAN

Erskine, Edward J. 8144 Gage Crescent Sterling Heights, Michigan 48078	Macomb County Community College Dean of Academic Services	Jan. 12-16
Remick, Edward L. 2705 Victor Lansing, Michigan 48910	Lansing School District Director of Research and Facility Planning	Jan. 12-16

MINNESOTA

Burland, Ronald 1181 Third Street, NW New Brighton, Minn- esota 55112	Minnesota State Department of Education, Director, Professions Development Section	Dec. 8-12
Carlson, Raymond P. Bemidji, Minnesota 56601	Bemidji State College Director of Research & Development	Jan. 12-16

MISSOURI

Miller, Leon F. 921 West Second Maryville, Missouri 64468	Northwest Missouri State College, Dean of Graduate Studies	Oct. 6-10
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NEVADA

Loveless, E. E. 2895 Moana Lane Reno, Nevada 89502	University of Nevada Associate Professor, School Administration	Dec. 8-12
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NEW HAMPSHIRE

Austin, Gilbert RFD #1 Piscataqua Road Durham, New Hampshire 03824	University of New Hampshire Director, Bureau of Educational Research and Testing	Dec. 8-12
Barker, Richard L. R.R. 2 Concord, New Hampshire 003301	New Hampshire State Department of Education, Director, N.H. RCA-V.T.	Jan. 12-16

NEW MEXICO

Bollmer, Barbara Silver City, New Mexico 88061	Western New Mexico University Assistant Registrar	Jan. 12-16
Dennis, David M. P.O. Box 1284 Silver City, New Mexico 88061	Western New Mexico University Director, Research Computer Center	Oct. 6-10

NEW YORK

Andrews, James 1117 East Genesee Syracuse, New York 13214	Syracuse University Assistant Director, School Services Bureau	Dec. 8-12
Assarelli, Joseph 100 Bleecker Street New York, New York 10012	New York University Director, Educational Research Services	Oct. 6-10
Howell, Edgar W. R.R. #1, Box 335A Guilderland, New York 12084	New York State Department of Education, Chief, Bureau of Urban and Community Programs Evaluation	Oct. 6-10
Jungherr, J. A. 28 West Wheeler Place West Nyack, New York 10004	Pearl River School District Assistant Superintendent-Business	Dec. 8-12
Lohman, Maurice A. 11 Woodbine Road Irvington, New York 10533	City University of New York Associate Professor, Institutional Research and Program Evaluation Center	Oct. 6-10
Samph, Thomas 116 Huntleigh Fayetteville, New York 13006	Syracuse University Research Coordinator, School of Education	Dec. 8-12
Shea, James F. 59 Old Farm Road Levittown, New York 11756	Suffolk Regional Education Center, Assistant Director of SCRC	Jan. 12-16

NORTH CAROLINA

Davis, John B. Jr. P.O. Box 2721 Greenville, North Carolina 27834	East Carolina University Director, Institutional Research	Oct. 6-12
Johnson, Scott 1307 Glenwood Avenue Raleigh, North Carolina 27605	North Carolina Board of Higher Education, Systems Analyst	Jan. 12-16

NORTH DAKOTA

Sholy, George I. 846 Fourth Street North Wahpeton, North Dakota 58075	Wahpeton Public School #37 Superintendent of Schools	Jan. 12-16
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OHIO

Hornbostel, Victor O. 631 Crestview Drive Bowling Green, Ohio 43402	Bowling Green State University Director of Graduate Studies in Education	Jan. 12-16
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Rodgers, William A. Department of Educational Administration Kent, Ohio 44240	Kent State University Director, Office of Research Studies and Services	Oct. 6-10
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OKLAHOMA

Helton, H. L. 715 Oklahoma Avenue Lahlequah, Oklahoma 74464	Northeastern State College Director of Research and Development	Dec. 8-12
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Weber, Charles L. 5200 Hales Drive Apt. 127 Oklahoma City, Oklahoma 73112	Oklahoma State Board of Education, Director of Finance	Oct. 6-10
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OREGON

Jones, John E. 304 Brookside Drive Eugene, Oregon 97405	University of Oregon Assistant to the Director Center for Advanced Study of Educational Administration	Oct. 6-10
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PENNSYLVANIA

Champagne, David W. Room 2311, Cathedral of Learning Pittsburgh, Pennsylvania 15213	University of Pittsburgh Assistant Professor/ School of Education	Dec. 8-12
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Laverty, Grace E. 122 Sylvan Terrace Harrisburg, Pennsylvania 17104	Pennsylvania Department of Education, Educational Research Associate	Oct. 6-10
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PENNSYLVANIA

Sharkan, William W. 2244 Union Street Allentown, Pennsylvania 18104	Bethlehem Area School District Director of Research	Jan. 12-16
Smith, James W. 3369 Sycamore Drive Pittsburgh, Pennsylvania 15234	University of Pittsburgh Manager, Support Services, Learning Research & Development Center	Oct. 6-10

SOUTH CAROLINA

Hendrichs, C. E. 108 Brighton Court Columbia, South Carolina 29203	University of South Carolina Educational Research	Oct. 6-10
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SOUTH DAKOTA

Rustad, H. C. 916 Eastgate Drive Vermillion, South Dakota 57069	University of South Dakota Assistant Professor, School Administration	Dec. 8-12
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TENNESSEE

Petry, John R. 3120 Domar Memphis, Tennessee 38118	Memphis State University Research Associate/ Assistant Professor	Jan. 12-16
Whittle, James W. Henderson, Tennessee 38340	Freed-Hardeman College Instructor and Director of Data Processing	Jan. 12-16

TEXAS

Aldrich, Wilmer W. Kingsville, Texas 78363	Texas A & I University Professor of Education, Chairman	Dec. 8-12
Clark, Lester L. 2715-B St. Edwards Circle Austin, Texas 787704	Texas Education Agency Program Director, Division of Assessment & Evaluation	Oct. 6-10
Sanders, Stanley G. 6003 Effingham Drive Houston, Texas 77035	University of Houston Associate Professor/ Admin- istration and Supervision	Dec. 8-12
Truax, William E. 2400 Bryan Commerce, Texas 75428	East Texas State University Dean, School of Education	Jan. 12-16

UTAH

Merrill, David M.
110 South Westwood Drive
Orem, Utah 84057

Brigham Young University
Director, Institutional Re-
search & Development; Chairman,
Educational Psychology

Jan. 12-16

WASHINGTON

Moe, Richard D.
1201 South Garfield
Tacoma, Washington 98444

Pacific Lutheran University
Dean, College of Professional
Studies

Jan. 12-16

WEST VIRGINIA

Bost, William A.
263 Clearview Heights
Charleston, West Virginia
25312

Appalachia Educational Lab
Deputy Director

Jan. 12-16

Goodwin, Harold I.
3071 University Avenue
Morgantown, West
Virginia 26505

West Virginia University
Chairman, Department of
Educational Administration

Oct. 6-10